Interview by Howie Rhee.

Our Conversation with Evan McCormick

Duke I&E: What did you do before Fuqua and where did you live?
EM: I worked at Fidelity Investments, in Boston. Specifically, I worked in Fidelity's Private Equity division that was focused on making $10 - $50 million investments in growth companies in the software-as-a-service, energy services, and cloud computing sectors. Our group was investing from a $500 million fund and leveraged Fidelity's vast IT and human capital resources to make investment decisions and help accelerate the growth of the businesses under our ownership. Before joining the private equity group, I was a stock analyst at Fidelity's mutual fund division. My focus was analyzing and recommending stocks in the automotive sector.

Duke I&E: What did you focus on at Fuqua? What were your main activities and areas of study?
EM: My initial focus at Fuqua was General Management, but I was bitten by the entrepreneurial "bug" early on in Term 1 through my involvement in the Program for Entrepreneurs (P4E). My experience with P4E exposed me to entrepreneurship for the first time and I fell in love with the idea of building a business from scratch and being part of the start-up community. Therefore, during my 2nd year at Fuqua I focused solely on developing my business plan for Investors Mosaic (the company I operate today) and didn't spend one minute recruiting for a corporate job.

I ultimately became received a Concentration in Marketing, but almost by default. I took a lot of classes in Marketing and Strategy b/c these were areas that I wanted to enhance my skill set. I avoided Finance classes because I had those skills from my work experience.

Outside of the classroom, I was very involved in the Asset Management Club because investing is a passion of mine. I participated in the Cornell Stock Picking competition during my first year and was President of the Asset management Club my second year. I was also an Admission Ambassador my second year because I felt passionate about wanting to help shape the incoming class and explain to prospective students what a great experience I had at Fuqua.

Duke I&E: What did you do after Fuqua?
EM: I stayed in Durham and launched Investors Mosaic. Initially the business model was geared towards operating a website that helped individual investors conduct in-depth stock research through the power of crowd sourcing. However, I quickly realized that most people have a hard time understanding stocks and how to value stocks in particular. Since my goal was to help people make better investment decisions, I decided that this was not the best course of action and ultimately transitioned the business to managing investment portfolios for them (as an Investment Advisor).
**Duke I&E:** What are you doing now?
**EM:** Now Investors Mosaic is a Registered Investment Advisor. I have very specific investment philosophy that I employ and manage stock portfolios for my clients.

I'm still in Durham with my wife Emily and son Sawyer. We love Durham and are excited about the growth the city is experiencing.

**Duke I&E:** Any key pieces of advice to pass on to Fuqua students?
**EM:** I would strongly recommend that students take advantage of the broader Duke University ecosystem during their two years. There are amazing speakers, events, meet-ups that take place among all the diverse schools/programs at Duke. There is a rich set of amazing experiences to be had given the world class undergrad, graduate, and medical school programs on campus. Get outside of the Fuqua "bubble"!

**Duke I&E:** Favorite memory of Fuqua?
**EM:** A typical answer, but probably UNC vs. Duke in Cameron (both years!). I wasn't a Duke basketball fan before Fuqua, but what an amazing environment. More broadly, I really enjoyed meeting classmates from all parts of the world and getting to ask in-depth questions about their culture. There is so much to learn from your classmates -- if you are willing to ask!